TAX MASTER

for 1985 Federal Income Taxes

for the Commodore 128 (in C64 Mode)
and Commodore 64 Computers

Features of **TAX MASTER:**

- **GUIDES** you in the **PROPER ORDER** through forms 1040, 4562 & Sched. A,B,C,D,E, and F.
- **PERFORMS ALL** arithmetic, **CORRECTLY!** You enter only the original data.
- **EASY CHANGE** of any entry, with instant **RECALCULATION** of the entire form.
- **TRANSFERS** numbers between forms.
- **CALCULATES** your taxes and **REFUND.** (Tax tables are included!)
- **SAVES** all your data to disk for future changes, re-use, or reference.
- **PRINTS** the data from each form.
- **MULTIPLE SCHEDULES** (for more than one business, farm, etc.) are supported.
- Data from **MANY DIFFERENT TAX RETURNS** may be stored on the same disk.

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IMPORTANT NOTICE

This program is presented as an aid to completing your 1985 Federal Income Tax Forms. It has been checked and verified, and no errors in computation have been found. HOWEVER, IT IS THE RESPONSIBILITY OF YOU, THE TAXPAYER, AND YOU ALONE, TO BE CERTAIN THAT YOUR TAX RETURN IS CORRECT!! WHEN YOU SIGN YOUR RETURN, YOU ARE CERTIFYING THAT YOU ARE RESPONSIBLE FOR ANY ERRORS.

Please double check your tax return. Neither MASTER SOFTWARE, its distributors, nor the program author(s) can be responsible for errors in your tax return. Our liability extends solely to the replacement of defective programs or program disks, for a period of 30 days after purchase, where no evidence of abuse or tampering exists. TAX MASTER is warranted by Master Software, 6 Hillery Court, Randallstown, MD 21133.

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TAX MASTER FEATURES

TAX MASTER is a full featured program that will help you prepare Forms 1040 and 4562, and Schedules A, B, C, D, E, and F of your Federal Income Tax Returns for 1985 Taxes.

TAX MASTER includes the tax tables.

TAX MASTER is available only on disk. It works only on the Commodore 64 computer, the Commodore SX-64 portable computer, and the Commodore 128 computer in C64 mode.

TAX MASTER permits storage and retrieval of your data to a separate disk (data disk) that you supply.

TAX MASTER allows storage of data for more than one taxpayer on the same data disk, by coding data files with the taxpayer's initials and 4-digit code.

TAX MASTER will provide a printout of all the data. It will work with virtually any 80 column printer that is connected as device # 4.

NOTICE

TAX MASTER was prepared from Federal Income Tax information available in November and December 1985. It is possible that last minute changes in the tax laws or in the tax forms will mean that some of the information in TAX MASTER is incorrect. In most cases, this will simply mean that some line numbers do not agree between the official forms and TAX MASTER. Consult the instruction book that comes with your Form 1040 and other tax forms to be sure that you are entering the correct information in the correct place on your tax form. YOUR TAX FORM, AND THE INFORMATION ON IT, IS YOUR RESPONSIBILITY, AND YOURS ALONE.

USING TAX MASTER

GETTING STARTED

To load TAX MASTER, enter the following commands (press the RETURN key after each line.)

```
LOAD"TAX MASTER",8
```

or

```
LOAD":*",8
```

When the READY prompt and flashing cursor appear, type RUN (and press RETURN). Do NOT remove the program disk from the drive at this time.

When the program is run, the screen will clear to black, displaying the TAX MASTER logo and copyright notice. Shortly, you will hear a tone and see an instruction to press any key. Press any key.

DISK DRIVE SELECTION

The first time the program is run after the computer is turned on, you will be asked to identify the type of disk drive set-up you have. Your choices are "S" for a single disk drive, such as the Commodore 1541, "T" for two single drives, such as two 1541's, and "D" for a dual drive such as the Commodore 4040 or the MSD-SD-2. Press the appropriate letter, then press RETURN. (Single drive is the default value, and an "S" is already present under the flashing cursor. You may just press RETURN if you are using a single disk drive.)

You are next asked to identify the disk drive device number(s). If you are using a single or a dual drive, you will be asked for only one number. If you are using two single disk drives, you will need to supply two different numbers. The disk drive device number can be 8, 9, 10, or 11. (Disk drives are normally configured as device number 8, unless you change them either by the hardware or software methods described in the disk drive manuals.) Enter the device number(s) of the disk drive(s) and press RETURN.

Your disk drive selection will be displayed, with an appropriate message about where to put the PROGRAM disk (the TAX MASTER disk). If you are using a dual drive, you will also be told where to put your data disk.

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(You should have already formatted the data disk according to the instructions in the manual that came with your disk drive. If the data disk is not formatted, press RUN/STOP to abort TAX MASTER, format the disk, and then run TAX MASTER again.) If you are not satisfied with your disk drive selection, press the "D" key, and you will be able to make a new disk drive selection. If you are happy with your disk drive selection, hit any other key (except the RUN/STOP key!) and you will go on to the FORM MENU.

If you have already run TAX MASTER since turning on your computer, the disk drive selection will be bypassed and you will go directly to the FORM MENU. You can change your disk drive selection by pressing the "7" key from the FORM MENU. See the discussion in the next section.

THE FORM MENU

The FORM MENU lists the six choices of tax forms you can work on, plus the choices of changing your disk drive information and ending the program.

The tax forms are listed on the FORM MENU in the order which usually makes it easiest to complete your tax return. For example, if you complete all your Form 4562's (Depreciation) first, the data from those forms will be available on disk when you work on your Schedules C (Business), E (Rents and Royalties), and F (Farm). Similarly, if you complete Schedules C, D, E, and F before working on Form 1040, the data from those schedules will be available on disk when you are ready for them.

IT IS NOT NECESSARY to complete the forms in the order shown on the FORM MENU. You may complete the forms in any order. Any form entry that could make use of data stored on disk can also be entered manually, with either an exact amount, an estimated amount, or a zero. Any such entry can be corrected later, either by entering new data manually or by allowing the program to take the data from disk.

Please note that Schedules A and B are included with the Form 1040 portion of the program. It is only possible to access Schedules A and B by choosing option "6" from the FORM MENU. See the specific instructions describing the Form 1040 portion of TAX MASTER.

To select a particular form from the FORM MENU, simply press the number key (from 1 through 6) that corresponds to the form you want. For example, to select Form 4562, just press the "1" key.

To check or change your disk drive selection, press the "7" key. You will be shown your disk drive selection. If you wish to change the selection, press the "D" key. Otherwise, press any other key (except RUN/STOP) to return to the FORM MENU.

To end your session with TAX MASTER, just press the "8" key. The screen will clear to blue and the flashing cursor will appear under the READY prompt. If you hit this key by mistake, just type RUN and press RETURN to start the program over again.

If you have pressed one of the number keys from 1 to 6, you will be shown the name of the form you have requested, and asked to verify that it is the form you really want. If so, press the "Y" key. If not, press the "N" key and you will be returned to the FORM MENU. Any other key will produce the error tone.

If you agree that the form shown is the one you want and press the "Y" key, you will be told to put the PROGRAM (TAX MASTER) disk in the proper disk drive. (It should already be there!) When you have verified that your disk drive is set, press any key except "M". If you change your mind and want to return to the FORM MENU, press the "M" key.

If you press any key other than the "M" key, the title logo will reappear, with the message to be patient during program loading. The programs for the various forms are long, and take between one and two minutes to load. When the program is ready, the form title will appear on the screen. When the program is ready to run, the beep tone will be heard, and the message "PRESS ANY KEY TO BEGIN" will be displayed. Press any key.

THE INDIVIDUAL FORMS

INTRODUCTORY SCREENS

If you have not yet run any of the individual forms of TAX MASTER, you will be asked for the Taxpayer's initials and 4-digit code. These items are explained in the next sections. If you have already entered this information for another form during this session at the computer, you will not be asked to supply that information again. You can, however, elect to change Taxpayer Initials and Code from the Main Menu of the tax form program.

If you have chosen Schedule C, you may be asked for a Business Code. If you have chosen Schedule F, you may be asked for a Farm Code. If you have chosen Form 4562 or Schedule E, you may be asked for a Form Code. If you have already entered these codes in this computing session, you will not be asked to supply them again. They will be displayed at the top of the screen on the Main Menu. You can elect to change these codes from the Main Menu.

If you have chosen Schedule D, you will be asked to put the data disk in the proper drive. The program will search for data from Form 1040. If it finds no data, you will be shown a warning message. If you know that there is no data from Form 1040 on the data disk, you can bypass the search by pressing the "M" key. You will still see the warning message. Further information on this is given below in the section entitled SPECIAL NOTE FOR SCHEDULE D.

TAXPAYER INITIALS AND CODE

When you are asked to enter the initials of the taxpayer, you must enter three initials. The space bar can be used if the taxpayer has only two initials. DO NOT press RETURN. You may use the DELETE key in case you enter a wrong initial. In most cases YOU are the taxpayer. However, if you are preparing taxes for someone else, enter his/her initials. The printouts and data files will be coded with these initials.

After entering the initials, you will be asked to enter a 4-digit code for this taxpayer. You can enter only the digits 0 through 9. DO NOT press RETURN. You may use the DELETE key in case you enter a wrong digit. It is advisable to use an easily remembered code, such as the last 4 digits

of the taxpayer's Social Security number. These digits, too, will be coded onto the printouts and data files.

BUSINESS, FARM, OR FORM CODE

On some forms you will be asked to enter a 4-character Business, Farm, or Form code. This code, too, will be used to identify separate printouts and data files. Pick an easily remembered code. This allows for more than one business, farm, or Schedule E to be completed by TAX MASTER for any individual taxpayer.

For example, assume that the taxpayer has two businesses: a computer software business and a personal products business. This taxpayer might code the software business SOFT, and the products business AVON. This way, a separate Schedule C can be filled out for each business, and the total profit or loss for both businesses will be included when data is transferred from Schedule C to Form 1040.

Schedule F asks for a Farm code. This works the same way as the Business code on Schedule C. Schedule E asks for a Form code. Schedule E can only hold rent/royalty information for three properties. If the taxpayer has more than three properties, additional Schedule E's must be completed. You might choose to identify your Schedule E files with codes such as E001, E002, etc. Remember, each data file is coded with the Form or Schedule from which it came, the taxpayer's initials, the taxpayer's code, and the Business, Farm, or Form code, if one is required.

To change the Business, Farm, or Form code, use menu option 5 from the Main Menu, described next. If only the Business, Farm, or Form code is to be changed, the Taxpayer initials and 4-digit code WILL have to be re-entered. Just repeat the same initials and codes used before. After re-entry of the Taxpayer initials and 4-digit code, the Business, Farm, or Form code will be requested. Enter the new code.

SPECIAL NOTE FOR SCHEDULE D

Schedule D checks the data disk for a file from Form 1040 for the taxpayer and 4-digit code you are using. This is to determine the adjusted taxable income for use in determining the maximum loss that can be reported to offset ordinary income. If no data file is found, which will occur if Schedule D is completed before Form 1040, as recommended, a warning message will appear before the main menu. You will need to use the Schedule D form one more time, after Form 1040 is completed, to achieve the correct results. This is explained further in the section entitled FINISHING UP.

THE MAIN MENU

The Main Menu appears next, and is the same for all Forms. It will show the Taxpayer initials, 4-digit code, and Business, Farm, or Form code you just entered. If any of these are incorrect, select option 5, by pressing the "5" key. This option will allow you to change all of the codes.

The following options are available from the Main Menu, and are explained in the sections below:

1 ENTER DATA-KEYBOARD. New income tax data can be entered, one item at a time, from the Commodore 64, SX-64, or Commodore 128 keyboard.

2 ENTER DATA FROM DISK. Data which has been previously stored on disk can be retrieved using the disk drive and this option.

3 STORE DATA TO DISK. Data which is in the computer's memory, which you have entered either from the keyboard, or from disk, or which has been changed, can now be stored on disk using the disk drive. YOU MUST STORE EACH FORM'S DATA SEPARATELY, BEFORE USING OPTION 8.

4 CORRECT THE DATA. Data which has been entered, either from the keyboard or disk, can be corrected.

5 CHANGE TAXPAYER & CODE. If the Taxpayer's initials, 4-digit code, or Business, Farm, or Form code, which were entered before the menu appeared and are displayed at the top of the menu, are incorrect or otherwise need to be changed, use this option.

6 PRINT THE DATA. This option outputs the data to the printer.

7 DISPLAY THE DATA. The data is displayed on the screen.

8 RETURN TO FORM MENU. The program returns control to the FORM MENU, so that you can select another form to work on. ANY DATA IN MEMORY WILL BE LOST WHEN THIS OPTION IS EXECUTED, SO DATA MUST BE SAVED USING OPTION 3 BEFORE USING OPTION 8!

ENTER DATA-KEYBOARD

Press the "1" key and you will be in the ENTER DATA-KEYBOARD mode. (There is no need to press the RETURN key after pressing any of the number keys "1" through "8" when the Main Menu is displayed.)

CAUTION--PRESSING THE "1" KEY WILL CLEAR ALL CURRENT DATA THAT IS IN MEMORY. YOU CANNOT RECOVER THE DATA IF IT HAS NOT BEEN SAVED TO DISK.

In this mode, the program walks you through all of the possible entries for the Form you are working on. You will see several types of data entry screens. A screen with a green background is for entry of text information, such as you name or Social Security number. White screens are for numeric entry. Some screens request both text and numeric data. By following along on your income tax form from the IRS, you will be able to determine what kind of input is required.

In general, just enter the phrase or number that is requested. The line number from the IRS form is shown, along with an abbreviated description of the line item. Press RETURN when you have completed your

entry, and the next item will be requested. For numeric data, if the amount is $0.00, you may either enter 0 (followed by the RETURN key), or simply hit RETURN.

At the bottom of most screens is a message permitting you to enter the letter "M" to return to the Main Menu. Press "M" and then press RETURN. The program will pause while calculations are performed. You will then be returned to the Main Menu for the form you are working on.

You will only be asked to enter data for those items which are direct entries on the tax form. Items which are merely calculations of other entries, such as sums of lines, differences between lines, or percentages of other lines, will not be presented to you for entry.

Occasionally, you will be asked if you want to enter data manually or from disk. This will only happen in cases where the data may logically be obtained from disk, such as the business profit or loss on line 12 of Form 1040. If you choose manual data entry, you proceed normally. If you choose data entry from disk, you will be reminded to put the data disk in the proper drive. Press any key when that is done.

The program will search the disk for a data file that is appropriate for the entry being filled. For instance, to use our previous examples, if we are entering Business Income/Loss on line 12 of Form 1040, and you already have filled in Schedule C's for your two businesses, you may elect to enter data from disk by pressing the "D" key. Press any key when the data disk is in the proper drive. The message "Searching the disk..." will appear. After a short wait, you will be informed that the data file (for Schedule C, of course) for Business Code SOFT has been found. You have the option of including it in your tax calculations, by pressing the "Y" key, or excluding it, by pressing the "N" key. If you press the "Y" key, the amount of profit/loss from the business will be displayed. You will then be told that the data file AVON has been found. Again, you may include or exclude the data.

After all data on the disk for the current taxpayer initials and code have been found, the amounts you decided to include will be summed. You will then have the opportunity to add (or subtract by entering a negative number) to that total, such as in the case of a third business for which you have not yet completed a Schedule C. When you finally say "N" to more additions, you will be presented with the data entry screen for the next line item on the tax form.

DATA ENTRY FROM DISK

Press the "2" key from the Main Menu, and you will be in the DATA ENTRY FROM DISK mode. You are immediately warned that entering new data will wipe out any existing data in memory. If you are sure you want to load data, press the "Y" key. If not, press the "N" key and you will return to the Main Menu.

The message to put the DATA disk in the proper disk drive will appear. When this is done, press any key except "M". If you press "M", you will be returned to the Main Menu.

> ONCE THE DATA BEGINS LOADING, THE DATA CURRENTLY IN MEMORY WILL BE LOST. YOU CANNOT RECOVER THE DATA IF IT HAS NOT BEEN SAVED TO DISK.

The disk drive will immediately begin searching for your data. Once the data is loaded, the menu will reappear. If there is a disk error in searching for your data file or in reading the data, the error message will be displayed on the screen. A "FILE NOT FOUND" error could mean that the taxpayer initials or code are incorrect. The initials and code must match exactly with those in the stored data for the program to recognize the data file.

DATA STORAGE TO DISK

Press the "3" key from the Main Menu and you will be in the DATA STORAGE TO DISK mode. The disk you use to store your data must have already been formatted according to the instructions in the manual that came with your disk drive. If you have forgotten to format the data disk, follow these instructions:

1. Hold down the RUN/STOP key and give the RESTORE key a sharp, strong tap. The screen should clear to blue, and the READY. prompt and flashing cursor should be in the upper left corner of the screen.

2. Put the data disk in the disk drive. CAUTION: FORMATTING THE DISK REMOVES (ERASES) ALL DATA THAT IS CURRENTLY ON THE DISK.

3. Type the following command:

```
CLOSE15:OPEN15,8,15,"N0:diskname,id":CLOSE 15
```

The "0" between the "N" and the ":" inside the quotation marks is the number zero, NOT the letter O as in Oh!. (If you put your data disk in drive 1 of a dual drive, substitute the number 1 for the zero here.) The "diskname" is any name for the disk that you choose, up to 16 characters in length. The "id" is an identification that you choose, which MUST be 2 characters in length. When you are sure you have typed the line correctly, press RETURN. The disk drive will run and format your disk.

4. Type GOTO1250 and press RETURN. (DO NOT type RUN!) You will be returned to the Main Menu of the form you are working on, and will not have lost any of your data that you entered into that form in TAX MASTER.

In DATA STORAGE TO DISK, too, you are warned that storing the data will overwrite, and therefore erase, data currently on disk for the taxpayer, code, and form shown. If you wish to continue, press the "Y" key. If not, press the "N" key, and you will be returned to the Main Menu.

If you press "Y" to continue, you will be reminded to put the data disk in the proper disk drive. When this is done, press any key except "M". Pressing "M" will return you to the Main Menu.

REMEMBER: ANY DATA FILE ON THE DISK FOR THE SAME TAXPAYER INITIALS AND CODES WILL BE REPLACED WITH THE CURRENT DATA.

If there are any disk errors during the data storage, they will be reported to you. When storage is complete, you will be returned to the Main Menu.

CORRECT THE DATA

Press the "4" key from the Main Menu to get to the CORRECT THE DATA Menu. You are given three options. Pressing "3" will return you to the Main Menu. Pressing "2" will allow you to check and correct all entries by paging through them one at a time. Pressing "1" will allow you to select the exact line number you wish to correct.

For selection 2, CHECK ALL ENTRIES, you follow the same path through the form as in DATA ENTRY-KEYBOARD. You will be shown the current value of the data in the computer's memory. To keep the data the same, simply press the RETURN key. To change it, type the new data and press RETURN. Again, where applicable, you will be presented with the option to retrieve data that might be present on disk.

As you page through the various screens, you will have the option on most screens to type "M" and press RETURN to end the Correction process and return you to the Main Menu. As with the ENTER DATA-KEYBOARD mode, there will be a slight pause while all the calculations are performed.

At the end of the trip through the tax form, you will again be returned to the Main Menu.

If you select option "1" from the CORRECT THE DATA Menu you will be presented with yet another menu, asking for the part of the tax form on which you wish to make the change. Press the number corresponding to the part or section of the form that you wish to change. Pressing the last number listed will return you to the Main Menu.

If you have pressed a number for a part of the form, you will usually be asked to enter the line number you wish to change from that form.

REMEMBER--YOU CAN ONLY CHANGE DATA THAT CAN BE ENTERED BY THE USER. ITEMS THAT ARE CALCULATIONS OF OTHER DATA CANNOT BE CHANGED. THEY WILL BE RECALCULATED AUTOMATICALLY BEFORE YOU ARE RETURNED TO THE MAIN MENU.

Enter the line number of the line you want to change. If the line number contains an A or B, enter that too. For example, on Form 1040, you can change line 6, 7, 9B, etc. You cannot change line 9. It doesn't exist. (Only 9A, 9B, and 9C exist.) You cannot change line 9A. It consists of data copied from line 10 of Schedule B. You cannot change line 9C. It consists of the following calculation: Line 9A minus line 9B.

If the line you entered cannot be changed, the warning tone will sound, and you will be notified. Press any key to select another part of the form to change, or press "M" to return to the Main Menu.

If the line you entered can be changed, the screen for that line will appear. The old value will be shown, along with a request for the new value. Hit RETURN to keep the value the same. Type the new value and hit RETURN to change the value. For data items that might be stored on disk, you will have the opportunity to allow the program to access that data and

include it. Just follow the on-screen instructions and the explanation of entering data from disk under DATA ENTRY-KEYBOARD.

After changing the one data item you have requested, you will have the option of selecting another line to change or returning to the Main Menu.

CHANGE TAXPAYER & CODE

Press "5" at the Main Menu to enter the CHANGE TAXPAYER & CODE mode. This mode will allow you to change the Taxpayer initials, 4-digit code, and/or Business, Farm, or Form code, without losing any of the financial data. This option is primarily useful when you find that you cannot retrieve previously stored data because the initials do not match those in the name of the file you wish to access, or you wish to create a new file of the same data under a different code. To change the Taxpayer initials and codes, follow the instructions under the section above entitled TAXPAYER INITIALS AND CODE.

PRINT THE DATA

Pressing "6" from the Main Menu will put you in the PRINT THE DATA mode. TAX MASTER provides you with a concise printout of each form. TAX MASTER presumes that your printer is an 80 column printer, and that it is device #4. To use a printer that is a different device number, see the section PRINTER DEVICE NUMBER, below.

The program asks you to make sure that your printer is set to TOP-OF-FORM. You can do this by advancing the printer paper manually until the seam or fold of the paper is positioned even with the top of the print head. It is important to set the printer to TOP-OF-FORM because the printout uses full pages and these printouts can be stored with your tax records for the year.

> PLEASE DO NOT SEND THE PRINTOUTS TO THE INTERNAL REVENUE SERVICE, NEITHER IN ADDITION TO NOR IN PLACE OF THE OFFICIAL FORMS. THE PRINTOUTS ARE NOT ACCEPTABLE TO THE IRS, AND MAY RESULT IN YOUR RETURN BEING SENT BACK TO YOU, CAUSING DELAYS IN YOUR REFUND AND/OR PENALTIES AND INTEREST ON TAXES DUE. THESE PRINTOUTS ARE FOR YOUR INFORMATION ONLY, AND YOU MUST TRANSFER THE DATA FROM THE PRINTOUTS TO THE OFFICIAL IRS FORMS.

At this point, you may cancel the printout and return to the Main Menu by typing M for "Menu". To begin the printout, press any other key, as instructed. If your printer is not switched ON or is otherwise improperly connected, you will get an error message and be "dumped" out of the program. If this happens, you will see the READY prompt and flashing cursor. To get back to the Main Menu without losing any of your data, immediately type: GOTO 1250 and press RETURN. This GOTO 1250 applies to all of the tax form programs.

During the printout, all data items will be printed, including those that were not entered by you but were calculated by the program. When the printout is finished, you will be returned to the Main Menu.

DISPLAY THE DATA

Press "7" from the Main Menu to display the data on your monitor or TV screen. The display includes a heading which informs you of which form is being displayed, which page (screen) is being shown, and how many pages (screens) there are to the data display. After each page is displayed, the program will wait until you press a key to see the next page. Pressing "M" will end the display and return you to the Main Menu. Pressing any other key will cause the next page to be displayed.

During the data display, all data items will be displayed, including those that were not entered by you but were calculated by TAX MASTER. After the last page is displayed, pressing any key will return you to the Main Menu.

RETURN TO FORM MENU

Press the "8" key from the Main Menu to end your work on this particular form. The screen clears, and you are asked to verify that you really are done with this form.

IF YOU END WORK ON A FORM, ALL DATA IN MEMORY WILL BE LOST. IT IS CRITICAL THAT YOU SAVE YOUR DATA TO DISK, USING OPTION 3 FROM THE MAIN MENU, BEFORE YOU END WORK ON EACH FORM AND RETURN TO THE FORM MENU.

If you press "M", you will be returned to the Main Menu. Pressing any other key will produce a reminder to put the program (TAX MASTER) disk in the proper drive. You still have a chance to return to the Main Menu without losing any of your data by pressing the "M" key. If you press any other key, you will end this portion of the program and return to the FORM MENU to select another form to work on or to end processing altogether.

SPECIAL NOTES FOR VARIOUS FORMS

FORM 4562-DEPRECIATION

Use a Form code that corresponds to the business, farm, or rental/royalty to which this depreciation applies, so that you will recognize that this data should be included when you use disk access of the data in Schedule C, E, or F.

In Line 1 of Section A of Part I, you may enter up to ten (10) items, even though only two are shown on the tax form.

The value on line 3 cannot be more than $5000, or $2500 for married taxpayers filing separately.

In Section B, lines 4A through 4D, only one item may be entered for each line. In lines 4E through 4H, five items may be entered for each line, even though only one or two are shown on the tax form. You must enter the deduction for column F. It is NOT calculated for you, in case you want to take less than the allowable deduction or depreciate the property over a larger number of years.

In Part II, you may enter up to ten (10) items, even though only four lines are shown on the tax form.

SCHEDULE D--CAPITAL GAINS AND LOSSES

Schedule D does not require a Form code, since only one Schedule D is filed for any given taxpayer. You will not be asked to supply a Form code.

In Part II line 1B and Part III line 9, eighteen line items may be entered, even though only 11 or 12 are shown on the tax form.

In Part IV, if you show a capital loss, line 25 may not exceed $3000 ($1500 if you are married and filing separately), nor may it exceed your adjusted taxable income. This is explained on page 25, the left hand column, of your instruction booklet for Form 1040. When you begin work on Schedule D, TAX MASTER attempts to access your Form 1040 data file to determine your adjusted taxable income. If it doesn't find a data file, it presumes that the adjusted taxable income is greater than $3000 ($1500 for married filing separately). If your adjusted taxable income is less than these limits, you will need to rerun the Schedule D portion of TAX MASTER after completing the Form 1040 portion. See the section entitled FINISHING UP, below.

In Part VII, Section B, line 47, you may enter up to 10 line items, even though only one is shown on the tax form.

SCHEDULE C--PROFIT/LOSS FROM BUSINESS

Supply a Business code that will give you a clue as to which business the data applies to, especially if you have more than one business.

If you complete Schedule C, you may also need to complete Schedule SE (Social Security Self Employment Tax). Schedule SE is not included in TAX MASTER.

Lines E and F are multiple choice. Press the number key (1, 2, or 3) that corresponds to your answer. Look at your Schedule C tax form to see what the numbers stand for.

In Part II, line 12, Depreciation, data may be entered either manually, or from a completed Form 4562 file on disk. Follow the on-screen instructions.

SCHEDULE E--SUPPLEMENTAL INCOME (RENT/ROYALTY)

You may complete as many Schedule E's as necessary. Data from only 3 properties may be included on any single Schedule E. Choose a Form code that reminds you of the order in which you filled out the forms, or which remind you of the types of properties covered by that particular Schedule E.

In Part I, line 17, you may enter up to 10 entries, even though 11 are shown on the tax form.

In Part I, line 19, Depreciation, data for each of the three properties may be entered either by entering one number from the keyboard, entering depreciation data for Part V from the keyboard, or from data stored on disk in a Form 4562 data file. Just follow the on-screen instructions.

In Part V, Depreciation, you are allowed up to 2 entries per property, just as shown on the tax form.

SCHEDULE F--FARM INCOME AND EXPENSES

Choose a Farm code that applies to your farm.

You must make a selection of CASH method or ACCRUAL method when you begin to enter data from the keyboard (Main Menu option #1). Once made, this selection cannot be changed. You will need to begin to enter data in a "new" Schedule F in order to be able to make a different selection.

In Part II, line 16, Depreciation, data may be entered either manually, or from a completed Form 4562 file on disk. Follow the on-screen instructions.

In Part II, line 37, up to 5 line items may be entered, just as shown on the tax form.

FORM 1040 PLUS SCHEDULES A AND B

Data entry starts with Schedule B. Even if you don't have enough interest to require that Schedule B be completed, you must enter your data here. It will automatically transfer to the proper places on Form 1040.

On Schedule B, you may enter up to 10 line items for Interest, and 10 line items for Dividends, even though the tax forms show space for 13 entries.

After Schedule B, data entry proceeds with Form 1040 side 1. For line 5, filing status, press the number key corresponding to your filing status. Press "Y" to verify your choice, or press "N" to make another choice.

Line 6, Exemptions. Enter the total number of exemptions claimed. Do not enter a dollar amount. TAX MASTER will calculate that for you.

For line 12, Business Income/Loss, you may enter data either manually or from a completed Schedule C file on disk. Just follow the on-screen instructions.

For line 13, Capital Gain/Loss, you may enter data either manually or from a completed Schedule D file on disk. Just follow the on-screen instructions.

For line 18, Rents/Royalties, you may enter data either manually or from a completed Schedule E file on disk. Just follow the on-screen instructions.

For line 19, Farm Income/Loss, you may enter data either manually or from a completed Schedule F file on disk. Just follow the on-screen instructions.

For line 22, Other Income, only one line item may be entered.

After side 1 of Form 1040 is completed, you must complete Schedule A. Even if you think (or know) that you do not have enough deductions to itemize, work through Schedule A. All charitable contributions must be shown on Schedule A. The charitable contribution for non-itemizers, lines 34B-34E of Form 1040, will be calculated based on data entered on Schedule A, lines 15, 16, and 17. There is no other way to enter data on lines 34B-34E of Form 1040.

On Schedule A, line 8A, General Sales Tax, the computer displays your Adjusted Gross Income, added together with those entries which are allowed in using the Optional State Sales Tax Tables. You use this dollar amount, together with your "family size", to look up the applicable sales tax deduction for your state. Of course, if your records show that you paid more in sales tax than the table lists, you can deduct the higher amount. In any case, enter the amount of sales tax deduction.

The Zero Bracket Amount, line 25 of Schedule A, is determined for you by TAX MASTER based on the filing status you have chosen.

If you don't have enough deductions to itemize, the program will tell you. You don't have to do anything special--the standard deduction is automatically figured for you.

After completing Schedule A, you go on to Form 1040, side 2.

A special charitable contribution deduction for non-itemizers is calculated for you, if applicable, and will appear in the printout or display, PROVIDED THAT YOU HAVE ENTERED YOUR TOTAL CHARITABLE DEDUCTIONS WHEN REQUESTED IN THE PROPER PLACE IN SCHEDULE A.

You will be asked if you want to enter your tax manually, or let TAX MASTER calculate it for you. If you want to enter it manually, such as if you used Schedule G, Income Averaging, press the "M" key. If you want TAX MASTER to figure your tax due for you, press the "A" key.

When you have completed through line 63, you will be told if you owe a balance to the IRS, of if you have a refund due you.

FINISHING UP

If your taxable income is low and you have completed Schedule D (Capital Gains/Losses), and you show a loss on Schedule D, it is necessary to rerun Schedule D. Do the following:

1. From the Main Menu, press "8" to go back to FORM MENU.

2. From the FORM MENU, press "2", and proceed to Schedule D. Be sure that there is a completed Form 1040 data file on the data disk.

3. When Schedule D runs, it will find your Form 1040 data and determine the maximum loss allowed.

4. Load the Schedule D data from disk, using Main Menu option 2.

5. Press "4" from the Main Menu to Change the Data.

6. Press the "1" to select "Individual Entry"

7. Press the "1" to select "Part I".

8. Press the "2" key to select line 2. Press RETURN.

9. Press RETURN to go back to the change menu.

10. Press "9" to return to the Main Menu.

11. Store the data using Main Menu option 3.

12. Return to FORM MENU by using option 8 from Main Menu.

13. Select Form 1040 from the FORM MENU by using option "6".

14. Load the data using option "2" from the 1040 Main Menu.

15. Press "4" for Change. Press "1" for Individual. Press "1" for Form 1040. Enter "13" and press RETURN.

16. Select the Disk option, and follow the on-screen instructions. The new data from Schedule D will be found and included in your Form 1040 data.

17. Return to the Main Menu. Save the data to disk by using Main Menu option "3".

You can, at any time, run printouts of your data, or display the data on the screen, to verify your work.

PRINTER DEVICE NUMBER

Line 4880 of all six of the major form programs includes the OPEN statement for the printing routine, and routes the printout to device #4. IF YOUR PRINTER USES A DEVICE NUMBER OTHER THAN 4, YOU MAY MAKE THE APPROPRIATE CHANGE IN LINE 4880 OF EACH OF THE PROGRAMS. For example, if you use the Commodore 1520 Printer/Plotter, the device number is 6. Change the OPEN5,4 command in line 4880 to OPEN 5,6 by positioning the cursor over the 4, typing a 6 (to replace the 4), and pressing RETURN. Printed output will now be directed to device #6.